

DATE: NOVEMBER 1, 2018

TIME: 2:00 PM

MEETING  
ORGANIZER:

Nicole DiStasio

ATTENDEES:

*State representatives:* Jennifer Perkins; Bard Hill; Jackie Rogers

*Provider Representatives:* William Ashe; Jennifer Stratton

*Recipient Representatives:*

*Non-Member Public Participants:* Beth Masters , Lynn, Cath Burns,  
Simone Rueschemeyer

MATERIALS:

Vermont's Needs Assessment Tool (required); Colorado Assessment  
Tools Comparison (suggested), slide deck

MEETING MINUTES

Scope of Work: Explore alternative  
standardized assessment tools

The group reviews the parameters  
for an assessment tool.

A Needs  
Assessment  
Tool should  
be:

- Valid, reliable, and consistent
- Person-centered
- Able to guide and inform our processes
- Reasonable to implement

**Defining:**

- *Reliable:* means the same thing, every time.
- *Valid:* means that is measures what it is supposed to be measuring.
- *Reasonable:* includes the cost, but also considers things beyond financial, such as duration of the process, culture change, credential level of assessors, how to transition, training needs to transition, and availability of assessors.

## Current Needs Assessment Tool

- What is the role of the tool?
- What is the policy?
- How is the documentation stored and accessed?
- How is the data being used?
- What are the training methods?
- How does it handle exceptional needs?
- What does it measure?
- How does it inform funding priorities?

**Role:** What are we using the information for?

- Developing ISAs
- Component of funding context
- Can support ISB
- Intake
- To identify support levels in an individual area (what is

currently in place, what are the consequences of those things in place)

- To justify movement of funds (or increase, decrease, changes)
- Change in need
- Annual (?)

**Policy:** is there clear policy regarding the use of the tool, and if so where is it?

- No policy that limits the lifetime of the assessment
- No tracking of when it is done and or when a new assessment is due

**Stored:** Where is it stored? And how is it accessed?

- Will be included in the implementation of the new EHR
- For some agencies a document (pdf) or a scanned image
- Not mineable
- Not designed and/or being utilized for any analytics

**Usage:** How is the data being used?

- Measures changes in the context. A person may remain the same, but the environment changes.
- SIS explicitly excludes the natural supports
- Person centered goals and desires is more in the ISA
- Blends the services and supports
- Used inconsistently
- Used as an attempt to establish a cost range: the same needs in an individual could have wildly different costs dependent on the package of services, the location, etc. The range gives the providers the flexibility.

**Training:** how are people trained to use the tool?

- Varies by agency: could use some standardization and structure
- Adopted by the State as a tool

- 
- Question: have any agencies made modifications to the tool?

**Measure:** What does it measure?

- Current services and natural supports
- Does not do current services and natural supports, but we ask those
- Informal and formal services
- Significant changes
- Includes expected or consistent changes (such as in school or out for summer) and would factor that into the yearly budget
- Would capture other (clinical) supports
- The tool is incorrectly being used to assess eligibility

**Follow Up:** Jennifer will check to see if she can get the Oregon supplemental questions, but she thinks they might be proprietary.

---

---

OUR NEXT MEETING'S DATE: **THURSDAY, NOVEMBER 15<sup>TH</sup> 2-330PM**